



200

File

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Search

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○

□

Address

https://od1.siebel.com/OnDemand/User/ForecastAdm

Go

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Advanced Search

Submit

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Step 1

Step 2

Step 3

Select your Forecast Snapshot Frequency

Create Forecast Snapshot Each \* Week 202

\* = Required Field

Next

Cancel

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FIG. 2

File Edit View Favorites Tools Help	
Back ▾	Search ☆ Favorites ○ Media ○
Address  https://odt.siebel.com/OnDemand/User/ForecastAddr  Go   Google	
CustomerCare Training Admin MySetup Deleted Items Help Sign Out	
Home	Calendar  Leads  Accounts  Contacts  Opportunities  Forecasts  Reports  Solutions  Service
Forecast Definition Help Tutorial Back	
Step 1 Step 2 Step 3	
Advanced Search [Submit]	
Create	
Task	
Appointment	
Contact	
Opportunity	
Account	
Lead	
Service Request	
Solution	
Select your Forecast Snapshot Auto Forecast Date	
Forecast Snapshot Day * Sunday  302	
* = Required Field	Previous Next Cancel
Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items	
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Done	

FIG. 3

File

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Step 3

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Finish

Cancel

Select the Roles you wish to include in your Forecast. The users related to each role will be the Forecast participants.

Company Roles

Field Sales Rep

Service Manager

Service Rep

Forecasting Roles

Executive

Sales & Marketing Manager

Inside Sales Rep

Administrator

Previous

Finish

Cancel

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FIG. 4



CRM OnDemand Search

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[Forecast Detail](#)
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[Back](#)

Created for: [Joan Williams](#)
Create Date: 9/21/2003
Status: Active

Forecast Summary

Date	Quota	Closed Revenue	Quota%	Forecast	Best Care	Pipeline	Expected Revenue
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

Team's Summary by Month

Owner Alias	Date	Quota%	Forecast	Closed Revenue	Best Care	Pipeline	Last Updated
ROGERS	7/1/2003	0%	\$1,600,000.00	\$1,200,000.00	\$0.00	\$1,600,000.00	9/21/2003 11:23:38 PM
ROGERS	8/1/2003	0%	\$2,400,000.00	\$800,000.00	\$0.00	\$2,400,000.00	9/21/2003 11:23:38 PM
ROGERS	9/1/2003	0%	\$3,200,000.00	\$1,200,000.00	\$0.00	\$6,400,000.00	9/21/2003 11:23:38 PM
RTAYLOR	7/1/2003	0%	\$21,600,000.00	\$1,050,000.00	\$0.00	\$29,500,000.00	9/21/2003 11:23:37 PM
RTAYLOR	8/1/2003	0%	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	9/21/2003 11:23:37 PM
Totals			\$34,750,000.00	\$4,600,000.00	\$0.00	\$45,850,000.00	

Show Full List

My Opportunities

Close Date	Forecasted	Opportunity Name	Account Name	Revenue	Sales Stage	Next Step	Previous
Refresh	9/3/2003	Y	Bay Construction - Std Order - 5 Phoenix 900	Bay Construction	\$400,000.00	6 - Closed/Won	Call
Refresh	9/3/2003	Y	Bay Demolition Services - Std Order - 5 Phoenix 900	Bay Demolition Services	\$400,000.00	7 - Closed/Lost	E-mail
Refresh	9/30/2003	Y	Bobcat Loaders & Excavators - Std Order - 5 Phoenix 900	Bobcat Loaders & Excavators	\$400,000.00	3 - Short List	None
Refresh	8/18/2003	Y	Carter's Rigging & Supply - Std Order - 5 Phoenix 900	Carter's Rigging & Supply	\$400,000.00	6 - Closed/Won	None

FIG. 6

SIEBEL  
CRM OnDemand

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Forecast Summary

Save

Cancel

Refresh Totals

Forecast Date	Closed Revenue	Forecast	Best Case	Pipeline	Expected Revenue
7/1/2003	\$3,450,000.00	\$25,200,000.00	\$0.00	\$33,100,000.00	\$11,975,017.30
8/1/2003	\$2,350,000.00	\$5,950,000.00	\$0.00	\$5,950,000.00	\$4,869,997.65
9/1/2003	\$2,000,000.00	\$12,800,000.00	\$0.00	\$16,000,000.00	\$9,470,000.00
Totals	\$7,800,000.00	\$43,950,000.00	\$0.00	\$55,050,000.00	\$26,315,014.95

CustomerCare

Training

Admin

MySetup

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Help

Sign Out

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FIG. 7

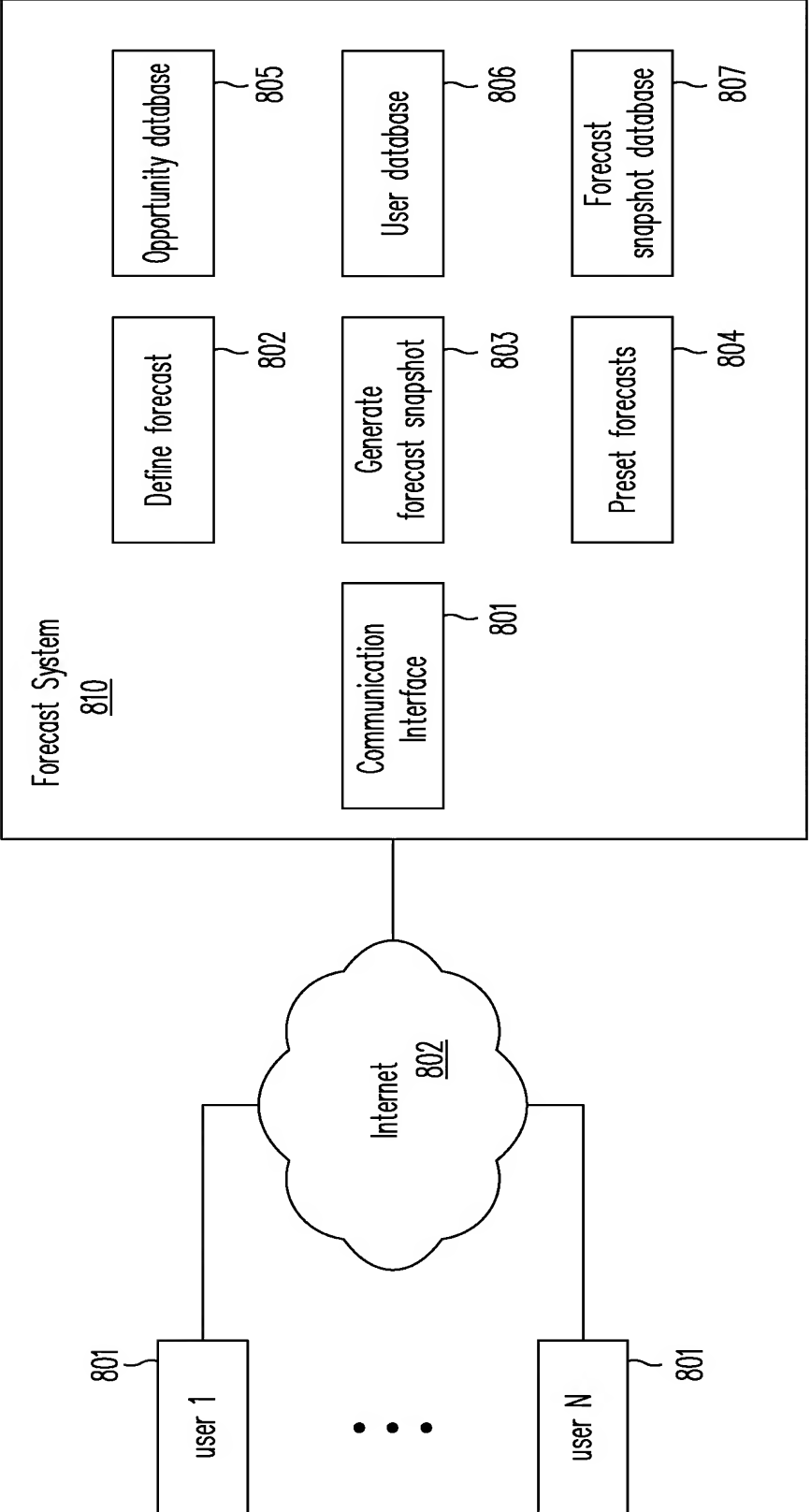


FIG. 8



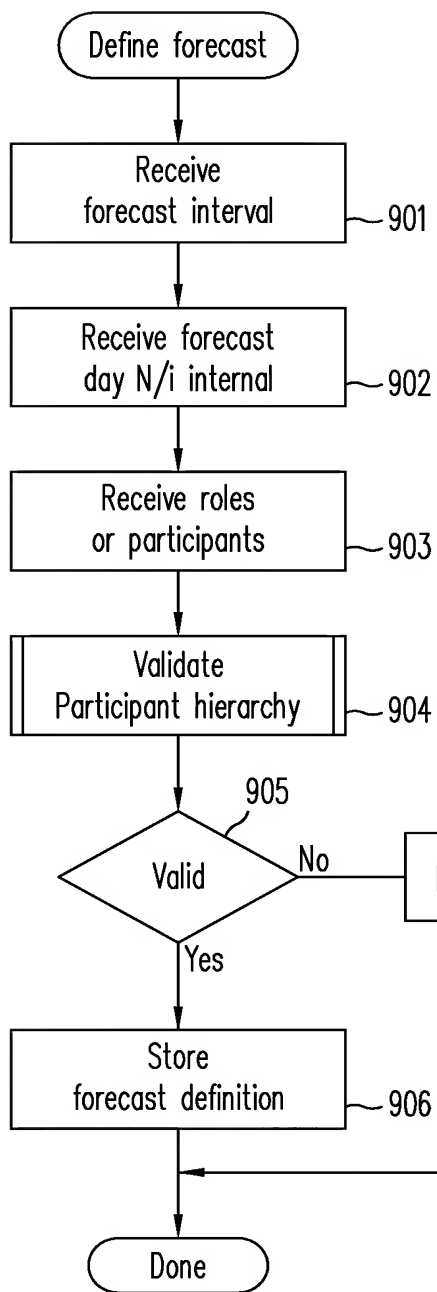


FIG. 9

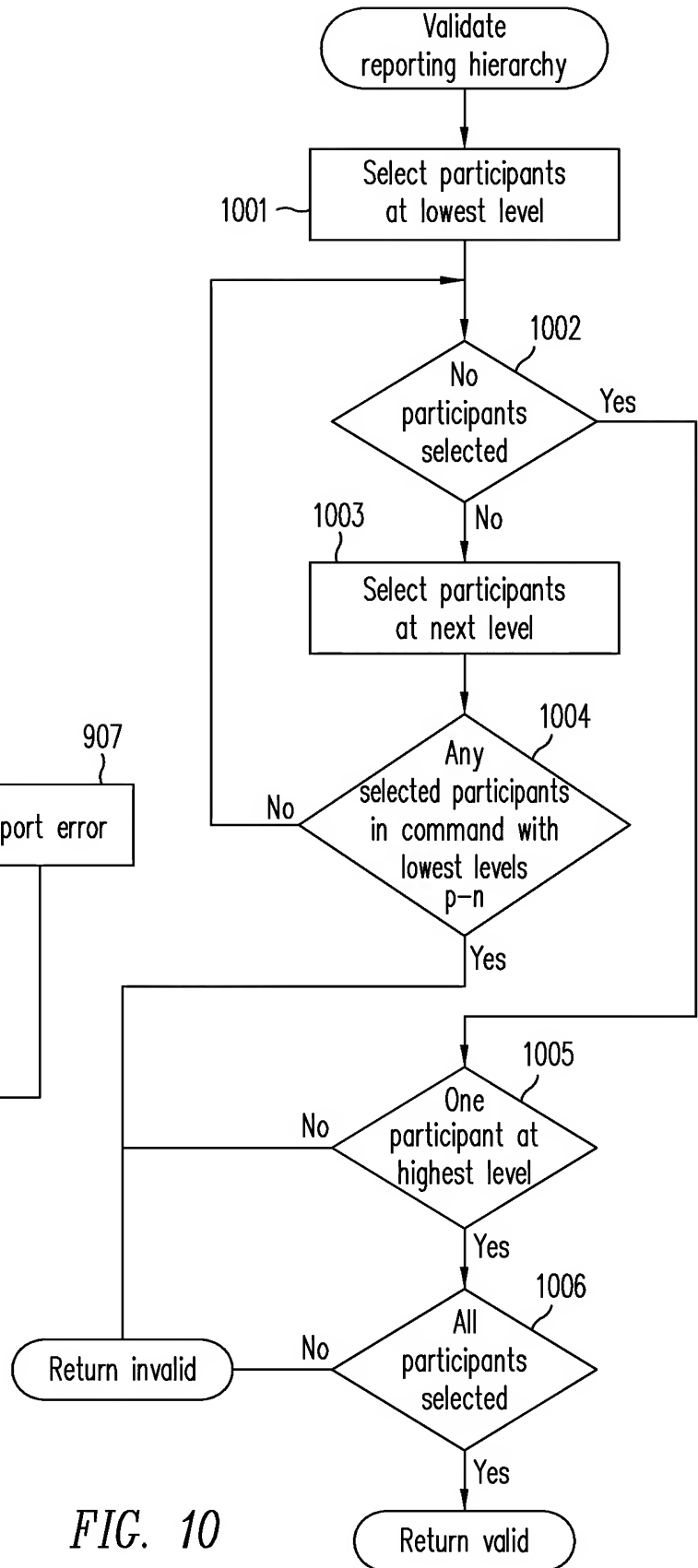


FIG. 10

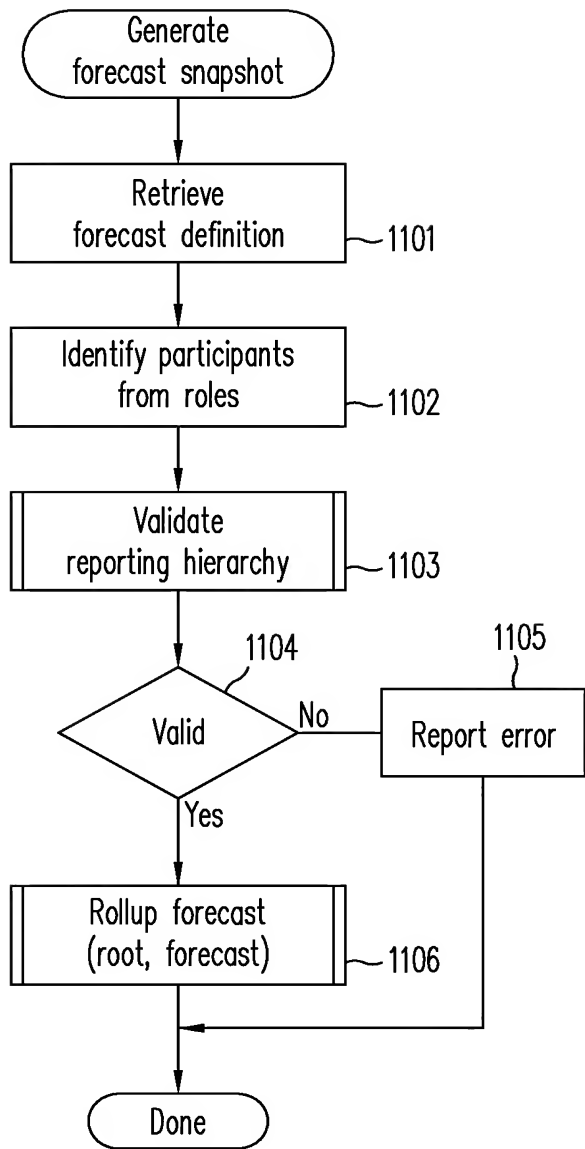


FIG. 11

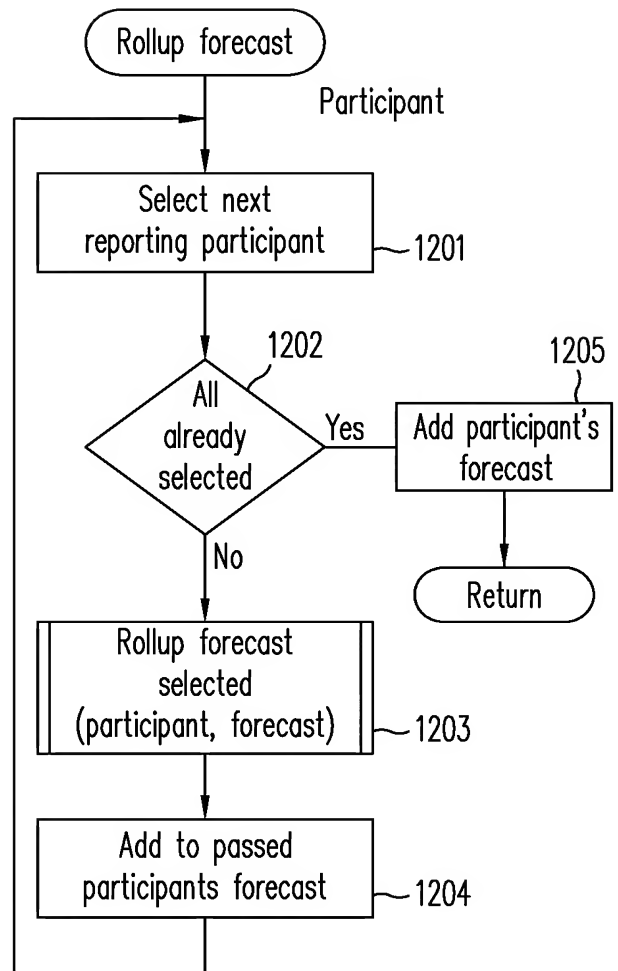


FIG. 12

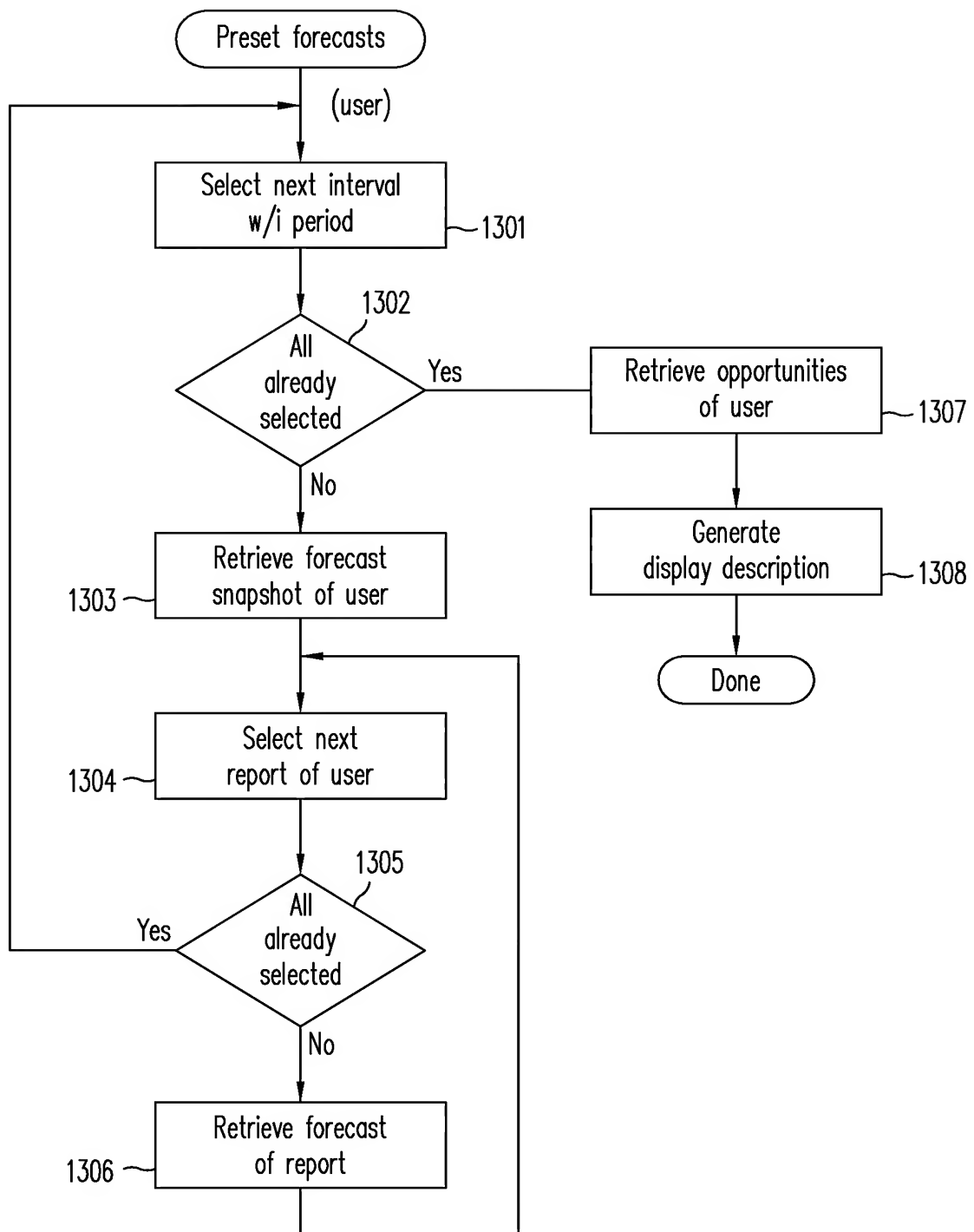


FIG. 13